

**AGENDA**  
**Energy Performance Contracting Workshop**  
**For Public Housing Authorities**  
April 4-8 & September 26-30, 2005  
Chicago, Illinois

Instructors: David Birr, David Anderson, James Cavallo, Eugene Goldfarb, Matt Pesce, John Comerford

Under the Department of Housing and Urban Development's (HUD's) Performance Funding System (24 CFR 990), public housing authorities can reduce utility costs through implementation of energy conservation measures and use these savings to pay for the capital improvements and for other needs within their authority.

In this workshop, participants will learn:

- How to follow HUD Performance Funding System regulations to fund energy conservation capital projects with private financing
- How other public housing authorities have successfully implemented performance contracts in public housing with energy service companies (ESCOs)
- How to implement the key elements of the performance contracting process through active learning exercises
- How to develop better working relationships with HUD staff and technical assistance providers

**MONDAY — April 4 & September 26, 2005**

8:00 - 9:00	Welcome and Introductions	Eugene Goldfarb
9:00 - 9:30	Introduction to Performance Contracting	Dave Birr
9:30 - 9:45	BREAK	
9:45- 11:15	HUD's Energy Incentives	John Comerford
11:15-12:00	Case Study #1 on Incentives	Mary Fox
12:00 - 1:30	LUNCH	
1:30 - 2:00	Utility Analysis in PC	John Comerford
2:00 - 2:45	Energy & Water Savings Opportunities	Dave Anderson
2:45 - 3:00	BREAK	
3:00 - 3:45	Utility Analysis and Site Selection	Dave Birr
3:45 - 5:00	Exercise 1: Site Selection	

**TUESDAY — April 5 & September 27, 2005**

8:00 - 8:30	Review	Dave Anderson
8:30 - 9:15	Group Presentation 1: Sites Selected and Why	
9:15 - 10:15	Developing and Issuing the RFP	Dave Birr
10:15 -10:30	BREAK	
10:30 -11:15	Exercise 2: Developing the RFP and Performance Contracting Team	
11:15 - 12:00	Case Study #2: Owner's Rep	Matt Pesce
12:00 - 1:30	LUNCH	
1:30 - 2:00	Selecting the ESCO, Part 1: Evaluating RFP Responses	Dave Birr
2:00 - 2:45	Exercise 3: Evaluating the RFP Responses	

**TUESDAY — April 5 & September 27, 2005 (continued)**

2:45-3:00 BREAK  
3:15 - 3:30 Group Presentation 3: ESCOs Short Listed and Why  
3:30 - 5:00 Ex 4: Selecting the ESCO, Part 2: Interviewing the ESCOs

**WEDNESDAY — April 6 & September 28, 2005**

8:00 - 8:30 Review Dave Anderson  
8:30 - 9:00 How EPC can Address Operations  
9:00-9:45 Role of Resident Education in EPC Dave Anderson  
9:45-10:00 BREAK  
10:00-10:30 Healthy Homes Improvement Opportunities Dave Anderson  
10:30 - 11:15 Case Study #3:Honeywell Harrisburg PHA Bill Thomae  
11:15-12:00 Case Study #4: Chicago Housing Authority  
12:00 - 1:30 LUNCH  
1:30 - 4:45 Field Trip  
4:45 - 5:00 Return to Classroom  
5:30 - 7:30 Social Mixer

**THURSDAY — April 7 & September 29, 2005**

8:30 - 8:30 Review  
8:30 - 9:15 Reviewing the Audit Results Dave Birr  
9:15 - 10:00 Exercise 5: Looking at Your Audit  
10:00 - 10:15 BREAK  
10:15 – 10:45 Measures Selected and Why  
10:45-11:15 Measurement, Verification, and Commissioning Dave Birr  
11:15-12:00 Case Study # 5: Siemens on M&V  
12:00 – 1:30 LUNCH  
1:30 - 2:00 Negotiating an Audit Agreement Dave Birr  
2:00-2:45 Negotiating an Energy and Water Services Agreement  
2:45-3:00 BREAK  
3:00-3:45 Project Financing Dave Birr  
3:45-5:00 Exercise 6: Negotiating the Contract

**FRIDAY — April 8 & September 30, 2005**

8:00 - 8:30 Review Dave Anderson  
8:30-9:00 Contract Negotiations Dave Anderson  
9:00-9:45 Implementing the Project  
10:00 -10:30 Aggregation for Procurement Dave Anderson  
10:30-11:15 Case Study #6 ESG  
11:15 - 12:00 Feedback and Distribution of Course Certificates